NEW MEMBERS' RESOURCE BOOK

A Reference for Institutions New to the BC Transfer System

Prepared by Finola Finlay
for the BC Council on Admissions & Transfer

BCCAT BRITISH COLUMBIA COUNCIL ON ADMISSIONS & TRANSFER

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The *New Members' Resource Book* is also available on the BCCAT website (bccat.ca).

BC Council on Admissions and Transfer
709 – 555 Seymour Street. Vancouver BC V6B 3H6 Canada
bccat.ca | articulation@bccat.ca | t 604 412 7700 | f 604 683 0576

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1. INTRODUCTION

1.1 The BC Transfer System

The BC Transfer System is the collective name for a complex environment in which autonomous institutions collaborate in many ways to facilitate student mobility and transfer of credits. Participating institutions have predominantly been public. Over many years, however, the system has expanded to include private or out-of-province institutions that have demonstrated the standards of institutional and program quality, integrity and openness required to participate fully in the system.

The *New Members' Resource Book* is a guide for institutions seeking admission, or newly admitted, to the BC Transfer System.

1.2 The BC Council on Admissions and Transfer

The coordinator and manager of the BC Transfer System is the BC Council on Admissions and Transfer, familiarly known as BCCAT. BCCAT staff operates under the guidance and direction of a council of representatives appointed by the provincial government. Representatives are selected from universities, colleges, institutes, post-secondary students, private post-secondary institutions, and the public secondary school system. The Council is not established under legislation, but is accountable to the minister responsible for advanced education.

In recent years, BCCAT has facilitated the expansion of the BC Transfer System to include new institutions through the development of policy and processes designed to set out the conditions under which new institutions can join the system, clarify expectations for new institutions, and safeguard the integrity and quality of the BC Transfer System.

1.3 BC Transfer Guide

One of the chief instruments whereby BCCAT coordinates transfer and articulation is the *BC Transfer Guide*. This online searchable database is the official record of all formal transfer agreements in BC. It not only provides information on course-to-course transfer, but also provides students with access to information on program transfer, associate degrees, and general information on planning a successful transfer route. Beneath the surface of the BC Transfer Guide is the Transfer Credit Evaluation System, an interactive system that enables the articulation of courses between institutions.

1.4 Purpose of this Resource Book

The *New Members' Resource Book* is a guide and reference manual for all institutions interested in seeking admission, or newly admitted, to the BC Transfer System. Since degree authorization through the Degree Quality Assessment Board (DQAB) process facilitates admission to the BC Transfer System, it is highly recommended as a reference for institutions considering or starting that process.

Articulation agreements are sometimes formed between institutions that are system members, and institutions that are non-members. In some cases, such agreements can be recorded in the BC Transfer Guide, provided certain criteria are met. Private or out-of-province institutions intending to enter into such agreements are also urged to consult this resource book to ensure that they understand the nature of the system within which their articulating partner operates.

In addition to this resource book, BCCAT staff is always ready to assist any institution to understand the BC Transfer System and the policies that govern participation, as well as to provide practical advice and assistance with all aspects of articulation and transfer policy and practice. A glossary of terms and definitions is attached as Appendix 1.

1.5 Companion Documents

This book is intended to be used in conjunction with some of BCCAT's other publications. Together, they represent a comprehensive guide to the norms, expectations and standards of the BC Transfer System.

Recommended reading includes:

- *How to Articulate: Requesting and Assessing Credit in the BC Transfer System*
- *Best Practice Guide: A Resource for Receiving Institutions*
- *The Articulation Committee Companion: A Resource for BC's Articulation Committees*
- *Principles and Guidelines for Transfer* *(see Appendix 3)*
- *New Members Policy* *(See Appendix 4)*

An annotated list of these and other helpful documents can be found in Appendix 2, and specific resources are noted throughout the text. URLs for the readings are provided in Appendix 3.

1.6 Acknowledgements

Many people, inside BCCAT and in the larger post-secondary system, have contributed their advice, wisdom, and expertise to this resource book. In particular, I stand upon the shoulders of Stephanie Oldford, who wrote the first draft of this document and whose enthusiasm for the project launched it in the first place. Major editing was coordinated by John FitzGibbon, with contributions by Raili McIvor, Rob Fleming, Devron Gaber, and Mike Winsemann. Valerie Yorkston managed the design and publication process.

If you have questions that are not addressed in this Resource Book, please contact us at articulation@bccat.ca.

2. HOW TRANSFER WORKS IN BC:
THE INSTITUTIONAL PERSPECTIVE

To appreciate how transfer works in BC, it is important to distinguish between two overlapping but distinct concepts: articulation and transfer. While both go into the make-up of a transfer environment, each is distinct. In essence, articulation is a process, and transfer is the end result of that process. Transfer, however, can occur in the absence of articulation.

'Transfer credit' denotes credit awarded at one institution for courses taken at another.

Within the BC Transfer System the word 'transfer' is used in several ways:

- A student 'transfers' (v.) when he/she moves from one institution to another and applies to be admitted either a) with transfer as the basis of admission, or b) under a different basis of admission, but in either case, carries credit from the sending institution that can be applied to fulfill credential requirements at the receiving institution. The word is often used loosely to mean the simple act of moving from one institution to another. However, it is preferable to use the term transfer only when credit is ported.
- The noun 'transfer' or the phrase 'credit transfer' is used to denote the act of moving from one institution to another and in the process transferring course credits from one institution to another.
- The phrase 'transfer credit' (e.g. on a transcript) denotes credit awarded at one institution for courses taken at another.

This section describes the two main avenues through which transfer takes place in BC: through articulation agreements at the course level or at the program level, or through case-by-case assessment. Articulation agreements refer to course/program equivalencies formally established and independent of actual movement. Case-by-case refers to the actual movement of students and their request for credit where a formal agreement is not already in place.

Occasionally articulation-based transfer is referred to as 'formal' transfer because it involves formal agreements, while case-by-case assessment is known as 'informal' transfer.

2.1 Key Resources for This Section

- *Principles and Guidelines for Transfer* *(see Appendix 3)*
- *The BC Transfer Guide*

2.2 Articulation-Based Transfer: Course-by-Course

In the context of post-secondary education, articulation[1] is the word used to describe the process whereby two (or more) institutions reach agreement on whether or how the curriculum of one is equivalent to the curriculum of the other, and on the appropriate credit that a receiving institution assigns to a course from a sending institution. Articulation-based transfer is sometimes known as formal transfer. Since this is a formally negotiated, inter-institutional agreement, articulation normally involves the following:

- Submission of curricular materials by the sending institution;
- Close assessment of those materials by the receiving institution, in order to establish the match of each curriculum. Since the objective is to ensure the success of students after transfer, the receiving institution carefully considers the course offered by the sending institution to ensure that it covers relevant material at the appropriate level and that instructional and grading standards are congruent with their expectations;
- A decision on transfer credit by the receiving institution: this can range from no credit to assigned credit (direct equivalence) or unassigned credit (general or elective credit) for courses;
- A record of the decision which is published and available to students for planning purposes, and which is honoured by the receiving institution. In BC, all institutions recognize the *BC Transfer Guide* as containing the formal record of all articulation agreements. Once the decision is made and recorded (including a decision of "no credit") a course or program can be said to have been articulated and the transfer credit is guaranteed;
- A relationship between the two institutions designed to support the formal agreement. In British Columbia these relationships involve membership in the BC Transfer System, and participation in the network of articulation committees that brings instructors together from member institutions and in meetings of Institutional Contact Persons (ICP), program advisors, registrars and others involved in the articulation process; and
- A commitment to the maintenance of the agreement including, where an institution changes the curriculum, an onus to issue advance notice of upcoming curricular change and provide opportunities to re-articulate, or to request a re-assessment of an articulation agreement.

Note that reciprocity cannot be assumed – that is, if a course at institution A is recognized by institution B, it does not necessarily follow that the course at institution B will be recognized at institution A. Reciprocity is not possible in all cases. For more on this consult *How to Articulate Handbook*.

> Articulation is the process whereby two or more institutions reach agreement on whether — or how — the curriculum of one is equivalent to the curriculum of the other, and on the appropriate credit that a receiving institution assigns to a course from a sending institution.

[1] Articulate: v. connect by joints, mark with apparent joints. Articulation: n. act or mode of jointing. *Oxford Dictionary of Current English*

2.3 Articulation-Based Transfer: Block, Program and Laddering Arrangements

Many agreements in BC are based on the assessment of a certificate, diploma or cluster of courses that is recognized as having an academic wholeness or integrity rather than on individual courses. Such agreements are developed in order to facilitate ease of movement from, typically, a diploma program at one institution to a degree program at another, and are therefore frequently described as "laddered" opportunities. Many variants exist in BC and most are recorded in the *BC Transfer Guide*, although some are found on institutional websites.

- **Block transfer** refers to credit awarded for successful completion of a block of courses to be applied to a related degree program. The Block Transfer Guide currently contains hundreds of formal block transfer agreements (BTAs). Constructing and negotiating BTAs is described in detail in the Block Transfer section of *How to Articulate*.
- **Degree partnership** arrangements have been formed between many BC institutions. Degree partnership is a term used to describe a variety of models that provide a guarantee to students who maintain adequate grades in a college program of continuation of degree studies at another institution.
- **Bridging programs** provide students with the opportunity to continue to a degree program by providing content that is typically not covered in a diploma program, but required for subsequent success in a degree program.
- **Dual credit programs** are most often the result of collaboration between secondary schools and their local colleges whereby students earn secondary and post-secondary credit in their final year of high school for introductory-level courses delivered at the secondary school. In addition to locally developed arrangements, Advanced Placement (AP) and International Baccalaureate (IB) programs and courses completed in secondary school are usually eligible for transfer credit in BC post-secondary institutions. For more information see the AP and IB Transfer Guides.

2.4 Articulation-Based Transfer: Summary

Articulation-based transfer, whether for courses or programs, involves formal inter-institutional agreements that include a commitment to establish and maintain trust in the articulation process through adherence to common academic standards and to truth, fairness, transparency and communication. In a well-developed transfer environment the articulation of a course or program is independent of any assessment of what a student has learned. In fact, courses are normally articulated in advance of any student enrolling. For this to work well trust is paramount. The sending and receiving process requires that institutions deliver what they promise and not hold others to higher standards than their own. Where difficulties arise they are normally resolved through open communication.

> In a well-developed transfer environment the articulation of a course or program is independent of what a student has learned.

The *BC Transfer Guide,* as the formal record of all articulation agreements, is reliable, accurate, current and easily accessible. It provides a guarantee that the transfer credit specified will always be honoured provided minimum grade requirements, residency, or time-limits have been satisfied.

By definition, all transfer credit agreements recorded in the *BC Transfer Guide* are articulation-based. Articulation-based transfer is highly recommended where the volume of student flows justify the resource expenditure to establish and maintain agreements. However, much of the transfer credit that students are awarded in BC institutions is assessed case-by-case without a formal, externally-recorded agreement. The next section deals with this kind of transfer.

2.5 Case-by-Case Transfer

Transfer credit can also occur independently of articulation, often as a result of a case-by-case assessment of a student's transcript. In the absence of a formal articulation agreement an institution can decide to grant transfer credit to students who appear to have successfully completed, at a previous institution, courses relevant to the program they are entering.

Articulation-based transfer is highly recommended where the volume of student flows justify the resource expenditure to establish and maintain agreements.

- At some institutions a student application will trigger an automatic examination of the student's transcripts with a view to awarding potential transfer credit. At others, the student must specifically apply for transfer credit. Each student's transcript is examined individually – hence the term case-by-case – and this process may involve the student in supplying course outlines or calendars from his/her previous institution.
- Once a case-by-case assessment is conducted, many institutions record the results in an internal database and use these transfer credit awards as precedents. For example, this database may record that a student arrived from Ontario College N with courses A, B and C and was awarded credit for those courses. If another student arrives the following year from the same college and with the same courses, the database record is used as a precedent and the second student is normally awarded the same credit as the first student. Since the receiving institution does not keep track of the sending institution's curriculum (as it does through the articulation process for BC sending institutions) a transfer credit award recorded in a precedent database is normally time-sensitive: for example it may be honoured only for five years.
- Since the four BC research universities (UBC, UVic, SFU, and UNBC) are not listed in the *BC Transfer Guide* as sending institutions, students transferring among these universities are subject to case-by-case assessment of their credits. Some credits may already be in the internal precedents database, and may be honoured automatically, while others may be in the database but not honoured (e.g. because they were taken too long ago, because of a very low grade), and yet others may not have been assessed previously and therefore are not in the database and must be handled individually.
- If an institution decides to publish its precedents database in the *BC Transfer Guide* (for BC courses) the transfer credit is converted from a case-by-case assessment to an articulated agreement. Most internal databases, however, remain documents that are for the administrative use of the institution and are not published either in the *BC Transfer Guide* or on the institution's website.
- A student from a BC college who has not received transfer credit for a course, or the kind of transfer credit he/she anticipates, and who believes that the course should be awarded transfer credit or specific credit, can apply for individual assessment of the course at the receiving institution.

Case-by-case assessments actually account for a great deal of transfer credit – as much or more than articulation-based transfer. For example, most university-to-university transfer and all out-of-province transfer currently use case-by-case assessment. Unlike articulation-based transfer, however, we have no way of quantifying the number of transfer credit awards based on case-by-case assessments.

2.6 Transfer Credit versus Prior Learning Assessment and Recognition (PLAR)

The awarding of credit based on a PLAR process is an after-the-fact assessment of what a student has learned in a formal, informal or non-formal setting. Often the knowledge was gained through some other little-or-un-documented method rather than a college/university course.

The assessment is conducted through a rigorous methodology which may include challenge examinations, portfolio review, or in-depth interviews.

In contrast, the awarding of transfer credit is often a proactive process: that is, the articulation process establishes the equivalence of courses, and the transfer credit is based on the results of that assessment, and not on what the student knows. In fact, in the BC Transfer System, a course is normally articulated and transfer credit awarded before a single student has enrolled in the course. In case-by-case transfer, the award is also based on an assessment of the course content and not on what students knows once they have completed the course.

3. HOW TRANSFER WORKS IN BC:
THE STUDENT PERSPECTIVE

While the processes that establish transfer credit exist for the ultimate benefit of students, students themselves are not normally aware of the nuances of those processes. What they do know (or should know) is that transfer is a recognized route to a degree (or other credential) in BC, but that a modicum of planning is necessary if they are to transfer successfully from one institution to another, and be able to apply their earned credit to the credential of their choice. What follows are some key concepts that institutions new to the BC Transfer System need to know to advise and educate their students about planning a transfer route.

3.1 Organization of the *BC Transfer Guide*

Historically, transfer students took one or two years at a college before transferring their credits to one of the province's universities to complete their degree program. This tradition is evident in the structure of the *BC Transfer Guide* where institutions were typically designated either as sending institutions only or receiving institutions only or as both sending and receiving institutions. Many institutions are still listed as only sending or receiving, while others are assuming both roles in the Guide.

Currently, new members fall into this traditional structure by default: that is, it is assumed, at least initially, that institutions offering associate degrees *send* students on to bachelor degree completion and institutions offering bachelor programs *receive* incoming transfer students. Although institutions may wish to be able to send or receive students, under the current structure of the BC Transfer System, these designations are normally initially determined by the type of degree credential being offered. BCCAT recognizes that today's students have more options for degree completion and do not necessarily follow the traditional college to university transfer path. BCCAT is working towards the development of a system that enables multi-directional transfer between appropriate institutions both public and private by removing the distinction between sender and receiver. However, the system has been built on relationships that have developed over time, and measured incremental action is appropriate. In the current structure, an institution that wishes to change its designation is expected to present a carefully assessed business case for such a change. See BCCAT's *Designation as a Receiving Institution* policy for more detail on this process.

In the meantime, students at a new institution that is designated as a receiving institution in the *BC Transfer Guide* will be able to see how courses from sending institutions transfer to that institution (once those articulations have been established), but will not be able to see how the courses they take at the new institution might transfer to any other institution. Therefore, new institutions designated as receiving institutions need to be very clear to their students that if they transfer to another institution in the BC Transfer System credit will be assessed on a case-by-case basis. Transfer credit is not guaranteed, but if they transfer to an institution with similar programs and curricula, they should receive credit as appropriate for relevant courses.

A new member of the BC Transfer System that finds its students being denied admission or transfer credit at other member institutions is encouraged to contact BCCAT for advice and assistance if necessary.

3.2 Admission versus Transfer

The term transfer is often loosely applied to the movement of students from one institution to another, whether or not an assessment and award of transfer credit was involved. This can create confusion for some students, who may not realize that first they must apply to be admitted to the receiving institution, and only if admitted will their transcript be processed and a decision made on an award of transfer credit. Admission to many institutions and programs is highly competitive, and students should be advised that they must meet the admissions criteria of both their intended institution and their program of choice.

3.3 Receiving Transfer Credit versus Applying Transfer Credit

Students at all institutions must fulfill both institutional graduation requirements (e.g. number of credits, average grades, literacy, numeracy or language proficiency) and degree requirements (stipulated courses for the major and/or minor, residency, faculty requirements) to graduate with their chosen credential. While many BC students use transfer credit to fulfill some of these requirements, it is not guaranteed that awarded credit is applicable in fulfilling credential requirements. Some examples:

- If a student is awarded more than 60 transfer credits, but the residency requirement of the receiving institution stipulates that all students must complete 60 credits at that institution towards a degree requiring 120 credits to graduate, the student will not be able to apply all the transfer credits awarded.
- If a student changes programs or majors, or changes his/her mind about a destination institution, or does not gain admission to the first choice institution, transfer credits applicable to the original program may not be applicable to the new program.
- A student may earn transfer credit for a course completed with a D grade, but may not be able to use that course as a prerequisite for required courses at the next level.
- A student who has earned credit in a "smorgasbord" of courses while trying to decide on a credential focus may find that not all credits are applicable to his/her final program choice.

3.4 New Sending Institutions

Institutions authorized to offer associate degrees are normally listed as sending institutions in the *BC Transfer Guide*. Students at sending institutions can plan their academic program by checking, in the *BC Transfer Guide*, the transferability of their courses to receiving institutions. If prospective transfer students have planned well, checked the requirements of their intended program, ensured that all courses they take transfer appropriately, and maintained an acceptable grade point average, they can normally transfer with little or no difficulty. Each year, thousands of BC students transfer successfully and continue towards their academic goal with no discernable loss of time, credit, or money.

Students at sending institutions can plan their academic program by checking the transferability of their courses to receiving institutions in the *BC Transfer Guide*.

4. THE ARTICULATION PROCESS

Where warranted by student flows or likely flows, or where necessary to fulfill terms of Minister's Consent (as with the associate degree, for example), new members will want to enter into transfer agreements for their courses or programs with other BC Transfer System members. Transfer agreements are negotiated and concluded through the articulation process, and using (in the case of course-to-course articulation) BCCAT's electronic Transfer Credit Evaluation System. Some new members may already have such agreements in place with BC or out-of-province institutions. Agreements with BC institutions may be recorded in the *BC Transfer Guide* as soon as consent is received. Those anticipating consent should ensure that they are ready to begin the process of articulation once consent is received.

4.1 Key Resources for This Section

- *Best Practice Guide: A Resource for Receiving Institutions*
- *How to Articulate: Requesting and Assessing Credit in the BC Transfer System*
- *Provincial Transfer Friendly Course Outline Form*
- *Recording Block Transfer Agreements with PICTIA-Accredited Institutions*
- *Articulation Committee Companion: A Resource for BC's Articulation Committees*
- *National Transcript Guide for Use in Canadian Institutions*

4.2 Workflow, Responsibility and Resources

New members should refer to the *Best Practice Guide: A Resource for Receiving Institutions*, which outlines the elements involved in administrating transfer credit efficiently within an institution, and identifies tasks, roles (e.g. who evaluates requests?) and workflow to achieve maximum efficiency as well as maximum fairness and good service to students.

Building a knowledge base is vital to the efficient administration of transfer credit within the institution: personnel from the recruiting, advising, admissions and registration area, as well as from faculty, must understand what is involved in articulation and responsibility for the various steps must be clearly assigned.

Building a knowledge base is vital to the efficient administration of transfer credit within the institution.

Participation in the BC Transfer System has resource implications for the institutions. The institution must fund a representative to attend each appropriate articulation committee and the Joint Annual Meeting (JAM) of Institution Contact Persons, System Liaison Persons and Articulation Committee Chairs. The institution must assign staff time to the administration of articulation requests from institutions and transfer credit requests from students, and faculty time to the evaluation of course outlines or the development of transferable courses. Students must be provided with transcripts in a timely fashion and in a format consistent with Canadian standards (see, for example, the *National Transcript Guide*).

4.3 Policy Development

Developing a policy related to transfer credit is a requirement of the Degree Quality Assessment Board (DQAB) application process. BCCAT can assist institutions with advice and feedback as they develop such policies. The *Best Practice Guide* has helpful advice and direction on the development of transfer credit policy, on an appeals process, and on how transfer credit policy intersects with residency, degree and graduation requirements.

4.4 Building Relationships

Institutions in the transfer system may have little information about new members, and therefore limited understanding of a new member institution's mission, priorities and operations. Since articulation is built on trust, fostered through relationships between individuals, new members need to introduce themselves and their programs to other institutions. This can start in advance of admission to the BC Transfer System, or as soon as Minister's Consent is received. There are several ways in which BCCAT can assist:

> Articulation is built on trust and fostered through relationships between individuals.

- Once consent is received and the new member signs the *Letter of Assurance* (see Appendix 5), BCCAT will send a notice to all current members, introducing the new institution, reminding all institutions of the process through which the new member was admitted, and requesting their cooperation in integrating the new member into the BC Transfer System.
- BCCAT will provide introductions to the chairs of relevant articulation committees, or to individuals at specific institutions with which the new member may wish to articulate.
- The new member may be invited to make a short presentation at an appropriate meeting such as an articulation committee meeting.

BCCAT hopes that its efforts in facilitating relationships, providing information and supporting new members' participation in the BC Transfer System, will assist others in the system to be receptive to articulation requests from new members. However, decisions to articulate rest ultimately with receiving institutions. Should any receiving institution decline to articulate it should provide a sound rationale for its decision. BCCAT can, upon request, provide advice and assistance to new members should this situation arise.

BCCAT endeavours to foster relationships between new members and the rest of the system. These efforts will achieve the best results when new members understand and respect the academic norms and practices of the transfer system and begin to build their own relationships with other institutions. A thorough review of the materials provided by BCCAT and consultation regarding any assumptions, questions or concerns should occur before any member signs the *Letter of Assurance.*

4.5 Analyzing the Business Case: Establishing Target Articulation

It may take new members some time to establish articulation agreements, either as a sending or as a receiving institution. Best practice is to concentrate on those courses, programs and institutions most relevant to the likely patterns of student movement to and from the new member institution. Geographic proximity, similarity of mission, similar student body, and analogous programs may all contribute to a decision to target an institution for the purpose of establishing an articulation relationship.

> Articulations should be limited to those courses that are a good match with those offered within the authorized degree programs.

We do not recommend that a new receiving institution immediately embark on a process of articulating every request it receives. Articulations should be limited to those courses that are a good match with those offered within the authorized degree programs. Establishing and maintaining articulation agreements in areas where student movement is unlikely is not a good use of resources.

Once a course has been articulated, the transfer credit agreement is recorded in the *BC Transfer Guide* as a formal and binding transfer credit agreement. Students must always receive the credit recorded in the *Guide* (unless they argue successfully for more favourable credit).

4.6 Using the Transfer Credit Evaluation System (TCES)

As part of the *Letter of Assurance*, new members are asked to identify a Transfer Credit Contact (TCC). The TCC will be the person in the institution who works directly with the electronic Transfer Credit Evaluation System (TCES), and is often a staff person in the registrar's office. BCCAT staff will provide a tutorial on the use of the system once the TCC has been identified.

The TCES is a sophisticated but user-friendly instrument that allows institutions to send course outlines and to request and evaluate potential articulation agreements. Each request is accompanied by a course outline.

4.7 Awarding Case-by-Case Transfer Credit

It is highly likely that students will enroll in new member institutions with credits from other post-secondary institutions. New members are encouraged to undertake an assessment of those credits, to do so in a timely manner, to use the same assessment of equivalence that is undertaken with formal articulations, and to be as generous as possible in their allocation of transfer credit. Once the credit has been awarded, it should be recorded in a central database, where it can serve as a precedent for the next instance of a request for credit for the same course. This ensures that students coming with the same course will be treated equitably. (See the *Best Practice Guide* for more on this.) This is also a good method for populating an institution's entries in the *BC Transfer Guide*, where appropriate.

4.8 Block Transfer Agreements and Other Arrangements

Rather than course-to-course articulation, it may make sense for new members to seek block transfer agreements (BTAs) with other institutions, either as senders or receivers. Block transfer agreements most often involve awarding a block of credits (normally 60, but this can vary, depending on the context) for a diploma at the sending institution, towards a specific degree at the receiving institution. BTAs are recorded in the *BC Transfer Guide*.

Other agreements, such as a BTA with non-member private institutions accredited by PCTIA, a bridging program, or a degree partnership agreement, can also be explored.

4.9 Role of Faculty, Staff and Curriculum Developers

The developers and deliverers of curriculum are central to the articulation process. By developing collegial and professional relationships with their counterparts at other institutions, by regularly attending relevant articulation committee meetings,

and by ensuring that each course is taught and evaluated at a level consistent with that of the academic standards prevailing at Canadian universities, curriculum developers and deliverers are key to ensuring that transferable courses conform to the expectations of other members of the BC Transfer System. It is also important that attention is paid to policies related to the teaching and learning environment.

BCCAT can conduct workshops and orientation sessions for faculty and staff at new member institutions on articulation and transfer topics and assist them with introductions to colleagues at other institutions.

BCCAT can conduct workshops and orientation sessions for faculty and staff at new member institutions.

5. PRE-ADMISSION PLANNING

5.1 Before the Degree Qualifications Assessment Board Review

Private institutions applying to the DQAB for the Minister's Consent to offer a degree program should consider whether their proposed program will be appropriate for some level of inclusion in the BC Transfer System. Consideration of transferability is normally a factor when preparing a proposal to offer an associate or baccalaureate degree. Transfer of credit between graduate level programs does not fall within the mandate of BCCAT or the BC Transfer System; rather, such transfer is handled by institutions on a case-by-case basis. Moreover, some degree program proposals may be put forward in a subject area that is so specialized and unique as to render course-to-course articulation within the system unlikely.

If an institution is planning to propose an associate degree, getting in touch with BCCAT as early as possible in the application process is recommended. The associate degree is a provincial credential, the establishment of which is dependent upon the articulation of each of its 20 constituent courses with one of the four research universities (UBC, SFU, UVic and UNBC). Careful relationship building is key to facilitating the articulations critical to the degree. Requirements for the associate degree can be accessed through the *BC Transfer Guide* at: bctransferguide.ca/associate/requirements.

If the institution is planning to offer a baccalaureate degree, it is also important to communicate with BCCAT early in the process. Baccalaureate degrees in BC are expected to provide for the admission of the transfer students and the award of transfer credit. Policies for both should be incorporated into the degree proposal and therefore it is important that the institution develop an understanding of how to build in appropriate principles and processes from the beginning.

5.2 Recommended Steps

1. Institutions should contact BCCAT and request a meeting and, in advance of the meeting, forward any documentation already developed regarding the degree proposal. For any new institution this is also the appropriate time for a careful and close read of the *New Members' Resource Book* and of the relevant documents suggested within.

2. BCCAT will discuss the expectations and requirements of members and provide resources and documents. The person who the institution identifies as its Institutional Contact Person (ICP) should attend this meeting, as should the senior academic administrator responsible for the degree program.

3. As the institution works through the proposal process, it should examine carefully the *New Members Policy* and the *Letter of Assurance*. It should contact BCCAT with any questions that it has and ensure that all relevant personnel in the institution understand the expectations contained in these documents.

4. The institution should use BCCAT's *Transfer Friendly Course Outline Form* as a template for course outlines, or use it as a checklist to ensure that course outlines contain all necessary information. If the institution will be listed as a sending institution, it should ensure its course outlines are ready and complete so that it can embark on the articulation process as soon as possible after consent is received.

5. The appropriate staff, faculty and the registrar's office should read *How to Articulate* carefully and ensure that they understand the expectations for participation in the articulation process.

6. The institution should request that BCCAT review the marketing and recruitment materials to ensure that claims about transferability are accurate.

7. BCCAT staff should review the institution's transfer and admissions policies to provide feedback and advice.

5.3 Advice from Institutions

The following bullet points are the result of two consultations conducted by BCCAT that were intended to gather practical advice to non-member private institutions contemplating application to the DQAB, from their colleagues who had gone through the process.

Reflections:

- The DQAB process was quite transparent; it progressed more or less as it was described and as expected;
- Getting and maintaining a Minister's Consent program is a lengthy and complex process; expect a thorough and in-depth review;
- One of the main challenges is the volume of paperwork involved in meeting the reporting requirements;
- Articulation requests were treated reasonably and fairly for the most part. When objections arose, issues were resolved through consultation.

Advice:

- Carefully consider the process and commitments in advance especially as they compare to your available financial, human and other resources;
- Consider the degree to which your institution and courses/programs are established in deciding when you are ready to apply for AA approval. That is, the more established and known you are, the easier the assessment process will be. Having a solid foundation of articulated UT courses is a valuable intermediate step;
- Consider both practical and creative elements when developing courses for the AA degree; balancing the two can be a challenge when designing with articulation in mind.

Best Practices:

- Maintain comprehensive statistics (e.g. on student enrolments and withdrawals);
- Devote appropriate resources to writing and implementing good academic and administrative policies; be diligent in adjusting them when required;
- Develop and implement a systematic means of defending academic integrity from the needs of the college's business and marketing functions (e.g. a sufficiently empowered board or committee responsible for setting academic policy and decision-making).

5.4 Once Consent is Granted

Once the Minister has granted consent for a degree program, BCCAT can begin the process of facilitating the admission of the new member into the Transfer System.

The Institutional Contact Person is BCCAT's main contact at a member institution. The ICP will be the first point of contact should any issues or concerns relating to transfer arise. An ideal candidate for this role is the registrar. This person needs to be identified in the *Letter of Assurance* (see Appendix 5.)

New Members are asked to appoint or identify a Transfer Credit Contact (TCC). The TCC will be the person in the institution who works with the Transfer Credit Evaluation System, and is generally a staff person in the registrar's office and may be the same person as the ICP. A tutorial on the use of the Transfer Credit Evaluation System may be requested once the TCC has been identified.

To post information about a new member on the BCTransferGuide.ca website, BCCAT will require a picture of the institution, a file with a version of the institution's logo that is suitable for the web, a brief written description of the institution, and a list of programs.

When a new member joins the Transfer System, BCCAT staff will send a notice to the other institutions in the system, introducing the new member and specifying which programs have been approved for articulation within the system.

6. THE ROLE OF BCCAT AND THE RESPONSIBILITIES OF NEW MEMBERS

BCCAT is not a regulatory body, nor is it a quality assurance agency. BCCAT staff work to coordinate and support transfer and articulation in BC through the following means:

- encouraging institutions to develop policies and practices that favour transferability;
- examining issues that arise with respect to transfer and student mobility;
- maintaining web resources that provide accurate and current information about post-secondary options through Education Planner; and
- informing students of the various transfer avenues available to them through the *BC Transfer Guide*.

However, BCCAT's role is not only facilitative, supportive, and informational; it also actively works to safeguard the integrity of the transfer system. In this role, staff is also involved in:

- mediating transfer disputes;
- ensuring fair treatment of transfer students;
- promoting adherence to the *Principles and Guidelines for Transfer*; and
- working to maintain the standards, norms and values of a high functioning transfer environment.

To be effective in these roles, both Council and staff maintain an objective and impartial position.

BCCAT's role is facilitative, supportive, and informational.
It also works to safeguard the integrity of the transfer system.

7. PARTICIPATION IN THE BC TRANSFER SYSTEM

7.1 BC Transfer System as a Quality Assurance Framework

Articulation, as described in *How to Articulate,* is a detailed and rigorous assessment of curriculum designed to ensure that each course or program is equivalent to that taught at the receiving institution. Through this process, the content and standard of the sending institution's curriculum is assured and students can have confidence that they will be well prepared for the next level of study after transfer. The articulation process that is the basis for the BC Transfer System forms an integral part of the quality assurance processes used throughout the BC post-secondary system. Given this, it is essential that new members participate, and are seen to participate in building and maintaining a high-quality post-secondary system. To do this, they must be aware of the expectations that others have for how they operate within this system.

7.2 System Expectations

The BC Transfer System and the wider BC post-secondary system operate under a set of shared values, norms, expectations, and goals. Because these elements are commonly understood by members, they are not always explicit and it can be daunting for a new institution to integrate into what is essentially an established culture. Where the values and norms are explicit, they are often communicated in specialized terminology. BCCAT has found that where new institutions encounter difficulties they often do so based on an inadequate understanding of the culture of the system, or a perceived failure to meet the expectations of other institutions. The following section outlines some of the major expectations of institutions in the BC Transfer System which present challenges to new members.

The BC Transfer System and the wider BC post-secondary system operate under a set of shared values, norms, expectations and goals.

7.3 Academic Governance

In public post-secondary institutions academic matters are the responsibility of the faculty, while administrative matters fall under the purview of a governing board or administrative council or committee. In BC, public universities, colleges and institutes have senates, education councils, or academic councils which routinely approve curriculum and oversee academic policies (e.g. policies on student evaluation and advancement, grading and academic appeals, plagiarism, admissions standards). The members of these academic governing bodies or committees are normally mainly faculty and academic administrators, who can expect to deliberate and operate without undue interference by the non-academic administrative wing of the organization. This model is often referred to as bicameral governance. Private institutions, especially sole proprietorships or for-profit companies where the owners and/or shareholders have an interest in the financial outcomes of the organisation, may find it challenging to hand over control of academic matters to an academic governance committee or council. Public institutions may be reluctant to articulate if they perceive that curricular and other academic decisions are not ultimately made by faculty participating in an academic governance process that ensures an appropriate measure of autonomy from non-academic governance bodies.

7.4 Academic Leadership and Instructor Qualifications

A major factor in establishing academic credibility within the system lies in the academic qualifications, knowledge and experience of the academic leadership (e.g., VP academic, provost, deans, department heads) and the qualifications of the faculty. Ideally, any institution new to the BC Transfer System should ensure that its academic leaders have a strong understanding of the academic culture of BC public institutions (which represent the majority of all institutions in the BC Transfer System).

For the guidance of all member institutions, BCCAT has published a *Position Statement on Instructor Qualifications* (see Appendix 6). It was developed because of ongoing concerns expressed, principally by universities, about the level and relevance of the qualifications of instructors at some institutions. It makes explicit a long-standing expectation that those teaching university-transferable courses at the first and second year level possess, at minimum, a master's degree in the discipline, or in a closely-related area.

7.5 Instructional Standards

Nothing undermines trust in an institution's academic program faster than the discovery that students are unsuccessful after transferring. It is imperative that new member institutions set an appropriate level of academic challenge for their students, that they grade student performance consistently and honestly, and that they put in place effective safeguards against plagiarism or other forms of academic dishonesty. This latter point is particularly important in the case of online courses.

Hiring knowledgeable academic leaders and appropriately qualified faculty, and encouraging them to interact with peers in other institutions (e.g. by attending articulation committee meetings or by participating in "marking bees") are helpful ways to ensure that teaching standards in particular are reliably congruent with that of a public university and that academic standards in general are high.

7.6 Special Note Regarding ESL Students

Some members of the BC Transfer System have expressed concern about the ability, or willingness, of institutions catering to ESL and international students, to ensure that those students can reach and demonstrate the level of English they need to read, write and participate in post-secondary coursework. This concern is based on real experiences in which students arriving with good grades in English courses from one institution are found to be unable to communicate effectively at another. While this is a multi-dimensional issue, and one which is certainly not confined to private institutions, a perception that students are flocking to certain institutions for an "easy pass" in English courses, can seriously damage the reputation of that institution. Institutions with large ESL populations should remain particularly vigilant about standards in university-transferable English courses.

7.7 Curriculum Development and Course Outlines

Articulation is based on an in-depth assessment of course outlines from a sending institution. Institutions applying through the DQAB process for Minister's Consent to offer a degree program must provide course outlines for every subject they will deliver. Devising new curricular outlines for courses commonly taught in the system (e.g. Introduction to Psychology) therefore, is often done in advance of students enrolling and the initial course offering. Once the degree is authorised, those course outlines (or updated versions) can be submitted for articulation through BCCAT's electronic Transfer Credit Evaluation System.

Because establishing equivalence includes an examination of the degree of match to courses at the receiving institution, the challenge for a new institution is to devise course outlines that meet broad content and outcomes for the course, rather than to match the content too closely to a course in one particular receiving institution, so that a course will articulate to

several different institutions. Best practice in constructing such course outlines is outlined in the *How to Articulate Handbook*. Worst practice is to simply copy a course outline from another institution. Even if the plagiarised course outline magnificently captures what the institution intends to teach, such blatant appropriation of another institution's intellectual property will inevitably discredit the sending institution.

Providing excellent course outlines is vital. Sometimes referred to as syllabi, or curriculum guides, these documents are the instruments through which the sending institution communicates its intentions regarding what will be taught (or learned) in each course, in sufficient detail to enable an assessment of equivalence. New members are referred to BCCAT's *Transfer Friendly Course Outline Form*. Use of this form does not guarantee articulation but it does guarantee that all the elements necessary for the assessment of equivalence will be provided to the receiving institution.

7.8 Importance of Follow-through

The DQAB process, through which an institution receives Minister's Consent to offer a degree program in BC, is prerequisite to membership in the BC Transfer System. Once the degree is authorised, the institutions can begin to deliver the curriculum and articulate its courses with other members. However, the quality assurance process is often largely a paper process – that is, assessment of the degree to be offered is based on written materials such as course and program outlines, instructor CVs, draft calendars and policies. Once the program is underway, it is vital that the institution actually delivers what it promised in its application.

The most important asset a new member has is its reputation. Failure to deliver a consistently high standard academic program or to assess students using appropriate grading norms will become obvious over time as students transfer to other institutions, as faculty compare notes in articulation committee meetings, or as comments are posted on social networking sites.

Student performance after transfer is tracked by receiving institutions and published regularly by BCCAT as "Profile Reports." All members are encouraged to participate in these exercises and to study the results carefully and use them to ensure that their students are well prepared for transfer.

7.9 Marketing to, Recruiting and Communicating with Students

New members must take particular care with their marketing materials and ensure that they do not make false or misleading claims about the nature of their participation in the BC Transfer System. For example, a new institution, not completely understanding how articulation and transfer works, or the nature of their membership, may make the mistake of promising students that all their courses will transfer to any BC university. BCCAT staff can assist new members to ensure that their recruitment and marketing materials correctly reflect the nature of the institution's relationship with other parts of the BC post-secondary system. BCCAT also recommends that institutions carefully vet statements made in marketing materials about transferability. Misunderstandings and assumptions that lead new members to overstate claims regarding transferability can negatively affect perceptions of the institution's integrity.

If a course or program at the new institution has been articulated and is listed in the *BC Transfer Guide*, then transfer credit is guaranteed for that course or program, as described in the *Guide*. In this case, new institutions can use this information in their marketing and advising materials. However, they are encouraged to seek advice on the wording from BCCAT and/or the appropriate receiving institutions.

7.10 Articulating with Non-Members

All members are free to articulate with any other institutions, whether or not the other institutions are members of the BC Transfer System. Only agreements between members, however, will be recorded in the *BC Transfer Guide*. There is one excep-

tion: BCCAT now has a policy for recording in the *BC Transfer Guide*, formal block transfer agreements between members of the BC Transfer System and PCTIA-accredited institutions titled *Recording Block Transfer Agreements with PCTIA-Accredited Institutions: Policy and Process*.

7.11 Articulation Committees/BCCAT Events

Within the BC Transfer System smooth student mobility between institutions is supported by all partners. Articulation committees play a critical role in that process. Currently, there are about 70 articulation committees recognized by BCCAT. They exist for most disciplines or programs that are delivered in more than one BC post-secondary institution.

Members are expected to send experienced representatives to the meetings of articulation committees appropriate to their degree programs. While it is understood that a new institution may not be able to send representatives to all relevant committees at first it is expected that as an institution grows and develops as a degree-granting institution it will expand its participation in these committees.

> Members are expected to send experienced representatives to the meetings of articulation committees appropriate to their programs.

The *Articulation Committee Companion* is BCCAT's primary resource for articulation committee members, and provides information, FAQs, and terms of reference. A review of this resource will prepare faculty or staff for their first articulation committee meeting.

Articulation committees provide an excellent venue through which new members can establish and build relationships, recognition and reputation within the BC Transfer System. BCCAT staff can provide introductions to appropriate articulation committees.

Another venue through which new members may seek to build relationships within the BC Transfer System is BCCAT's annual meetings and events. For instance, every year, BCCAT hosts a general meeting attended by Institution Contact Persons, articulation committee chairs and System Liaison Persons. This event, the Joint Annual Meeting (JAM) is an excellent opportunity to introduce the new member institution and its degree programs to the rest of the system. Occasional workshops and seminars, of interest to members, will be well advertised in advance.

The cost of sending representatives to articulation committee meetings and the JAM event is born by the institution. It can be a significant cost item, both for travel and for faculty/staff time, and new members should be mindful of these resource considerations in their annual budget and planning cycles.

7.12 Private Institutions and Provincial Student Mobility Research

BCCAT's key focus is the maintenance of a healthy transfer system that allows students to move from one institution to another and to gain appropriate credit for coursework taken at the previous institution. Hence, BCCAT is very much involved in student mobility research so that it can determine if students are indeed moving among post-secondary institutions in BC.

In recent years, significant gains have been made in the understanding of student mobility in the public education system. Much of this increased knowledge is due to the work of the Student Transitions Project (STP), a partnership among BC's public post-secondary institutions and the Ministries responsible for Education and Advanced Education. The purpose of this partnership is to share student level data in order to conduct student mobility research which institutions can use for planning purposes. BCCAT is a member of the steering committee which manages the STP's work. Please visit www.aved.gov.bc.ca/student_transitions/ to review research reports produced by the STP.

If you have any questions about the role of private post-secondary institutions in provincial student mobility research in BC, contact us at articulation@bccat.ca.

Central to the ability to conduct mobility research is the Personal Education Number (PEN), a nine-digit unique student identifier assigned by MEd to all students in the public K to 12 and post-secondary systems. Now that the STP can track student movement through the BC public education system using the PEN, it can begin to consider including private post-secondary institutions' students in the mobility research. However, students at private institutions are not yet receiving PENs. It is expected that, sometime in the future, private institutions with programs approved by the Degree Quality Assessment Board (DQAB) and Trinity Western University will begin to "PEN" their students, as the first phase of an initiative to introduce PENs to private post-secondary institutions.

For DQAB-approved institutions seeking entry to the BC Transfer System, BCCAT expects that those institutions will submit not only the mandatory student level information for PENs but also additional information required by the STP. The STP research provides an annual analysis of (a) the movement of students from the K to 12 system into the post-secondary system and (b) the movement of students among post-secondary institutions. The latter analysis and reporting are very important to BCCAT's goal of understanding student movement within the post-secondary system, and we would like that research to include both private and public members of the BC Transfer System. Information resulting from this research can also be very useful to post-secondary institutions for enrolment planning purposes.

If you have any questions about the role of private post-secondary institutions in provincial student mobility research in BC, please contact BCCAT at articulation@bccat.ca.

8. CONCLUSION

While BCCAT staff is available to provide information and advice, or to facilitate introductions to others in the system, much of the success new members will achieve will result from their own careful study and observance of how the system works. Like any culture, the BC post-secondary system has evolved over time and has developed norms and expectations, spoken and unspoken, with which new members must become familiar. That is not to say that a new institution cannot do things differently, or that innovation is discouraged. However, in an era of increasingly mobile students, successful adaptation and integration into an existing system will facilitate effective articulation and transfer agreements.

> Much of the success new members will achieve will result from their own careful study and observance of how the transfer system works.

APPENDIX 1: GLOSSARY

Academic Program

A program of study, usually involving theoretical knowledge and research, and usually leading to a diploma, certificate, associate degree or bachelor's degree.

Admission

Being allowed to enrol in an institution, faculty or program once the entrance requirements are met. Some admission is limited by spaces available, and by selection criteria.

Advanced Standing

Advanced standing is placement to a certain level, based on assessment of previous work, or on achievement in a placement test. In BC institutions credit is normally not granted for advanced standing, and credit for exempted courses (see *Exemption*) must normally be replaced by taking other courses.

Articulation

The process used by post-secondary institutions to determine which courses are equivalent to one another. Articulation is normally a course-to-course analysis or comparison, but it can also involve whole programs. By extension, articulation refers to the development and implementation of agreements that provide for inter-institutional movement of students or the connecting of two or more educational systems.

Articulation Committee

One of numerous committees recognized by BCCAT that exist for most disciplines or programs that are delivered by more than one member of the BC Transfer System. Program areas include academic, applied and professional, vocational, trades, and technical, and Adult Basic Education. Members meet to discuss curriculum, transfer and articulation issues.

Assigned Credit

Transfer credit is "assigned" when a course is assessed as being equivalent to a specific course at a receiving institution. For example, UFV's Math 111 course is equivalent to UBC's Math 100 course. (See also *Unassigned Credit*.)

Basis of Admission

The evidence, primarily academic, on which an applicant's admission decision is based, e.g., secondary school record, college credits and GPA, etc.

BC Transfer System

The BC Transfer System is made up of BC public post-secondary education institutions, BC private institutions, Yukon College, and Athabasca University. Membership is based on approval through a recognized quality assurance process that is different for public, private, and out-of-province institutions.

Block Transfer

Block transfer is the process whereby a block of credits is granted to students who have successfully completed a certificate, diploma or cluster of courses that is recognized as having an academic wholeness or integrity, and that can be related meaningfully to a degree program or other credential.

Bridging Programs

Bridging programs provide students with the opportunity to continue to a degree program by providing content that is typically not covered in a diploma program, but required for subsequent success in a degree program.

Calendar

The book of rules, regulations, policies, programs (and requirements), and courses for a particular post-secondary institution.

Cluster Credit

Cluster credit denotes situations where two or more courses must be combined, at either the sending or the receiving institution, in order to achieve equivalence.

Concentration

A program of study with a required number of courses in a specific discipline. Similar to a Major or Minor, but with fewer requirements.

Course Outline

A description of the main content, organization and expected outcomes of a course, normally including the number of credits awarded for successful completion, hours of class time required, evaluation procedures, assignments, texts and readings.

Credit

The value assigned to a course. For example, many courses are valued at 3 credits. Most credentials specify the number of credits to be earned. (See also *Unit*.)

Credit Transfer

Credit transfer consists of the granting of credit by one institution for equivalent courses completed at another. Once transfer credit is granted, the course is accepted in lieu of an internal course and can be applied in the same way as the internal course to fulfill general or specific credential requirements. Block transfer may also be granted for completed programs. Course and program equivalencies that have been articulated (i.e. assessed for equivalence and awarded credit through a formal inter-institutional request process) are recorded as transfer agreements in the *BC Transfer Guide*. Non-articulated courses are assessed and credit is awarded on a case-by-case basis.

Degree

Recognition of successful completion of a program of studies (usually about 40 courses, or 120 credits, or 60 units), often with a specific Major, Minor or Concentration.

Degree Partnership

Degree partnership is a term used to describe a variety of models that provide a guarantee to students who maintain adequate grades in a college program of continuation of degree studies at another institution. Degree Partnership arrangements have been formed between many BC institutions.

Diploma

Recognition of successful completion of a program of study, usually two years in length. Post-degree diplomas are often one year in length.

Degree Quality Assessment Board (DQAB)

The DQAB was appointed by the Minister of Advanced Education and Labour Market Development who established criteria, in consultation with the board, to be applied when a private or out-of-province public institution applies for consent to provide degree programs or use the word "university" in British Columbia. The same program review criteria apply to new degree programs proposed by British Columbia public post-secondary institutions.

Dual Credit

Dual credit programs are most often the result of collaboration between secondary schools and their local colleges whereby students earn secondary and post-secondary credit in their final year of high school for introductory-level courses delivered at the secondary school. In addition to locally developed arrangements, Advanced Placement (AP) and International Baccalaureate (IB) programs and courses completed in secondary school are usually eligible for transfer credit in BC post-secondary institutions.

Exemption

The waiving of a requirement. A student may be excused from completing a course or program requirement if the appropriate institutional representative grants approval. Usually exemptions are granted only to students who have proven that they have comparable learning. Although an exemption may be granted, the student is normally required to replace the exempted course with an alternate.

Grade Point Average (GPA)

The average overall grade for all courses taken for credit in a particular semester, year or institution. A cumulative GPA (CGPA) is the average of all grades for courses taken to date at one institution.

Letter of Permission (LOP)

A document which gives a student permission to take a course at an institution other than the university in which he or she is currently enrolled.

Level Credit

Some institutions assign "level credit" where a course does not have an equivalent at the receiving institution. e.g. CAP CHEM 205 (3) = UVIC CHEM (1.5) 200 lev. (See also *Unassigned Credit*.)

Lower Level (or Lower Division) Courses

Introductory courses, usually making up the first two years of a university degree, are considered lower level or lower division courses.

Institutional Contact Person (ICP)

The Institutional Contact Person is BCCAT's main contact at a member institution. The ICP will be the first point of contact should any issues or concerns relating to transfer arise. An ideal candidate for this role is the registrar. This person needs to be identified in the *Letter of Assurance*.

Preclusion

A preclusion indicates that a student will not receive credit if he/she takes the specified course later, as in "precludes credit for Anthropology 301."

Prerequisite

A course a student must take before he or she can take a more advanced course in the discipline.

Receiving Institution

The institution to which a student intends to transfer. In an articulation agreement, it is the institution which grants credit for courses completed at a sending institution.

Registration

The process of enrolling in individual courses after completion of all required admission procedures.

Requirement

A course a student must take in order to complete a credential.

Residency

The number of courses or credits (or percentage of the program) a student must complete at an institution to graduate from that institution.

System Liaison Person (SLP)

A non-voting member of an articulation committee, usually an administrator with responsibility for the discipline. SLP's are appointed by BCCAT and act to provide system perspectives and linkages to administrative bodies.

Sending Institution

The institution from which a student is transferring. In a transfer agreement, it is the institution where the courses were completed.

Syllabus

See *Course outline*.

Transcript

An official transcript is the original record verifying a student's enrolment and achievement, and certified (e.g., by signature and/or seal) by the institution. It is normally sent directly, by mail or electronically, on the student's request.

Transfer

Transfer credit indicates the granting of credit toward a credential by one institution for programs or courses completed at another.

Transfer Credit Contact (TCC)

The TCC is the person in the institution who works directly with the electronic Transfer Credit Evaluation System (TCES), and is often a staff person in the registrar's office.

Transfer Credit Evaluation System (TCES)

The TCES is a sophisticated but user-friendly instrument that allows institutions to send course outlines and to request and evaluate potential articulation agreements. Each request is accompanied by a course outline. Each institution has an account in the TCES that provides access to agreements published in the *BC Transfer Guide*. The TCES is accessed by either the Institutional Contact Person (ICP), or the Transfer Credit Contact (TCC) at the registrar's office of the institution.

Transfer Student

Some institutions formally define a basis of admission for transfer students and specify criteria for that admission category, but the term "transfer student" is also used more broadly to refer to any student who wishes to transfer credit from one institution to another.

Unassigned Credit

Transfer credit is "unassigned" when a course is assessed as being of a university level but not equivalent to a specific course at a receiving institution. Example: VIU CHIN (3) 2nd yr.

Unit

Two institutions in BC use a unit rather than credit system: the University of Victoria and North Island College. Three semester credit hours = 1.5 UVic units. (See also *Credit*.)

Upper Level (or Upper Division) Courses

Advanced courses offered in the final two years of a university degree are considered as upper level or upper division courses.

APPENDIX 2:
KEY POLICY DOCUMENTS AND RESOURCES

Articulation Committee Companion

bccat.ca/articulation/resources/companion

The *Articulation Committee Companion: A Resource for BC's Articulation Committees*, a 45-page publication, is a guide to the mandate and operations of post-secondary articulation committees in BC. It details the role and terms of reference for articulation committees and includes the principles and guidelines that govern articulation agreements. Also discussed are the roles and responsibilities of the Chair, individual committee members, the System Liaison Person, and BCCAT, setting effective agendas and preparing minutes.

BC Transfer Guide

bctransferguide.ca

The *BC Transfer Guide* is the home to all the transfer guides that have been supported by the BC Transfer System. This site includes the course-to-course transfer guide, the block transfer guide, AP/IB transfer guide, the business management transfer guide, and various program specific transfer guides. This website is your best resource for information on transfer in BC.

Best Practice Guide: *A Resource for Receiving Institutions*

bccat.ca/articulation/resources/receiving

This guide has been developed primarily for institutions in the BC Transfer System interested in receiving and evaluating requests for articulation in the BC Transfer System.

Designation as a Receiving Institution policy

bccat.ca/pubs/receivingpolicy.pdf

This document establishes a structure to facilitate the implementation of the recommendation to liberalize access to the receiving institution designation.

Education Planner

educationplanner.ca

Education Planner is an educational planning resource whose purpose is to provide clear, reliable and detailed information about public post-secondary programs available in BC. Using Education Planner can help learners make well-informed decisions about their education and career options.

How to Articulate: *Requesting and Assessing Credit in the BC Transfer System*

bccat.ca/articulation/resources/handbook

The *How to Articulate* handbook is a resource for institutions, departments, and faculty members who are engaged in articulating courses and programs for credit within the BC Transfer System.

Letter of Assurance *(See Appendix 5.)*

Before an institution may be listed in the BC Transfer Guide and seek formal articulation agreements within the BC Transfer System for its approved programs, the institution must provide a signed *Letter of Assurance* to BCCAT. The Letter constitutes a contract between the new institution and BCCAT. The Letter of Assurance Form is the last section in the *New Members Policy.*

National Transcript Guide for Use in Canadian Institutions

arucc.com/documents/transe.pdf

In September 2001, the Association of Registrars of the Universities and Colleges of Canada's (ARUCC) Executive Committee launched an initiative to develop a national academic record and transcript guide for use in Canadian postsecondary institutions.

New Members Policy *(See Appendix 4.)*

bccat.ca/pubs/newmember.pdf

This policy is the more formal version of the rules and provisions outlined in this Resource Book. The staff of the program member institutions who work with BCCAT on transfer & articulation should familiarize themselves with both the Policy and the Resource Book and copies of both should be kept on hand for quick reference.

Position Statement on Instructor Qualifications *(See Appendix 6.)*

bccat.ca/system/qualification

This position statement represents BCCAT's position on instructor qualifications within the BC Transfer System.

Principles and Guidelines for Transfer *(See Appendix 3.)*

The BC Council on Admissions and Transfer as manager of the BC Transfer System and on behalf of its members adopted these statements after thorough consultation with the system as the principles and guidelines that govern transfer relationships within the BC Transfer System. Failure to comply with the *Principles and Guidelines of Transfer* can result in suspension or revocation of the approval to articulate within the system. The Council adopted this revised set of *Principles and Guidelines* in May 2010. Approved by all members, they have been revised and updated to reflect the changing BC post-secondary system.

Recording Block Transfer Agreements with PCTIA-Accredited Institutions:

Policy and Process bccat.ca/pubs/PCTIAblock.pdf

Private institutions that are not members of the BC Transfer System may request articulation with member institutions. The BC Council on Admissions and Transfer now has a policy for recording formal block transfer agreements between BC public institutions and private, PCTIA accredited institutions in the *BC Transfer Guide*.

Transfer-Friendly Course Outline Form

bccat.ca/articulation/resources/outline

The *Provincial Transfer Friendly Course Outline Form*, developed by a committee of experienced faculty and administrators and with large-scale consultation within the BC Transfer System, is designed to ensure inclusion of all information needed to assess transfer equivalence. The form is accompanied by a host of related resources, including forms for use when requesting designation at SFU for Writing Intensive ('W'), Breadth ('B') or Quantitative ('Q') courses. This form can be used in two ways: as a template for the development of a new designed-to-transfer course, or as a checklist to ensure the components of an existing course outlines are similar to those on the transfer-friendly course outline form.

APPENDIX 3:
PRINCIPLES AND GUIDELINES FOR TRANSFER

Purpose

Credit transfer provides efficient, cost-effective access to post-secondary education and limits geographical barriers for students. The BC Transfer System includes public and recognized private and out-of-province institutions, facilitates student mobility, supports system quality and ensures the portability and applicability of credit by providing dependable, accurate resources to students and institutions. Key system values are those of transparency, fairness, autonomy, predictability and accountability, built upon trust between system partners.

The BC Council on Admissions and Transfer as manager of the BC Transfer System and on behalf of its members adopted this revised set of Principles and Guidelines in May 2010. Originally approved by all members, they have been revised and updated to reflect the changing BC post-secondary system.

Principles and Guidelines

In the BC Transfer System

1. **Students earn transfer credit for equivalent learning and can apply that credit to fulfill credential requirements.**

   A. Formal transfer credit agreements recorded in the BC Transfer Guide constitute a guarantee to students.

   B. Students should not be required to retake courses successfully completed elsewhere, nor should they expect to receive duplicate credit for equivalent courses.

   C. To support and encourage planning, students must have access to information on course equivalencies, program prerequisites, and levels of achievement on which admission and transfer credit will be awarded.

   D. Students are responsible for informing themselves about transfer processes.

2. **Students can expect to be treated equitably by all member institutions.**

   A. Where an institution defines a basis of admission for transfer students, the institution should specify the minimum cumulative GPA and the minimum number of credits required.

   B. Where an assessment of previous academic performance forms part of an admission decision, a transfer student's post-secondary academic record should be the primary consideration, rather than performance in secondary school.

   C. The minimum grade for individual course transfer is normally a passing grade, as defined by the institution awarding the original credit. A higher course grade should not be required by the receiving institution unless the same requirement applies to the equivalent internal course.

   D. Students should have access to avenues of appeal for transfer credit decisions.

   E. Students should not be disadvantaged by changes made to transfer arrangements while courses are in progress.

3. **All members acknowledge and respect the primary jurisdiction of each institution for transfer policy and academic integrity.**

   A. Each institution in the BC Transfer System should plan for and accept transferring students using clearly stated policies and procedures to govern the awarding of transfer credit.

   B. Institutions may limit admission to programs based on space availability or on criteria pertinent to the program.

   C. Variations in institutional programs that reflect differing missions, context, expertise, and modes of delivery should be respected and accommodated: accommodation strategies may include institutions setting flexible course or credit requirements for transfer students.

   D. Given system norms and expectations regarding appropriate qualifications for instructors of transferable courses, institutions should be prepared to provide information on their instructor qualification policies upon request.

4. **Transfer agreements are based on rigorous articulation processes and transparent communication.**

   A. Institutions should allocate appropriate resources to transfer administration, including sending a representative to the relevant articulation committees.

   B. Institutions should respond to articulation requests in a timely manner, preferably within two months of the receipt of the request.

   C. All articulation shall be based on an assessment of equivalence that recognizes that effective learning can occur under a variety of arrangements and conditions. Assessment may include (but not be limited to) comparisons of learning outcomes, scope and level of content, assessment strategies, hours of instruction, student success in subsequent courses, program accreditation and provincial or national certification requirements.

   D. The institution seeking transfer credit should provide course or program outlines that contain all the elements necessary for the assessment of equivalence.

   E. Institutions should provide a rationale for a denial of an articulation request.

   F. It is the responsibility of all institutions to maintain the standard of content, outcomes and instruction upon which an original transfer agreement was based, to re-articulate when necessary and to provide adequate notice of curricular changes affecting established transfer agreements.

   G. An award of transfer credit should confer certainty: it should be clear what credit is being awarded as well as the number of credits awarded (normally the same number of credits as for the equivalent course).

5. **Evaluation of the BC Transfer System is focused on assessing its effectiveness for students.**

   A. Members of the BC Transfer System are expected to submit data regularly to the relevant system repositories.

   B. Institutions are encouraged to review research on the effectiveness of the BC Transfer System and to adjust their policies, practices or standards where advisable.

   C. Institutions should be advised by student mobility research when assessing the business case for articulation for their institution, courses or programs.

Definitions

Credit Transfer

Credit transfer consists of the granting of credit by one institution for equivalent courses completed at another. Once transfer credit is granted, the course is accepted in lieu of an internal course and can be applied in the same way as the internal course to fulfill general or specific credential requirements. Block transfer may also be granted for completed programs. Course and program equivalencies that have been articulated (i.e. assessed for equivalence and awarded credit through a formal inter-institutional request process) are recorded as transfer agreements in the BC Transfer Guide. Non-articulated courses are assessed and credit is awarded on a case-by-case basis.

Transfer Students

Some institutions formally define a basis of admission for transfer students and specify criteria for that admission category, but the term *transfer student* is also used more broadly to refer to any student who wishes to transfer credit from one institution to another.

APPENDIX 4:
BC TRANSFER SYSTEM: NEW MEMBERS POLICY

Preamble

The mandate of the BC Council on Admissions and Transfer (BCCAT) includes the responsibility to manage and coordinate the BC Transfer System. Upon its inception in 1989, the Council inherited a Transfer System that included all BC public institutions, Yukon College, and three private institutions. Since then, new institutions have been approved to articulate within the BC Transfer System once they have undergone a quality assurance (QA) process acceptable to the Council. To date, acceptable QA processes have been The University Presidents' Council "Policy on Transfer Credit" (now defunct), the current QA processes of the Degree Quality Assessment Board (DQAB), both of which have focussed on private institutions, and BCCAT's "Inclusion of Alberta Institutions in the BC Transfer System: Policy and Process" which outlines the conditions under which an Alberta institution may be approved to articulate. Other QA processes, whether focussed on public or private institutions, may be found acceptable in the future as a basis for approval.

Once approved to articulate, the institution becomes *de facto* a member of the BC Transfer System. Membership includes approval to request articulation with other members and to record those agreements in the BC Transfer Guide, and (for BC institutions) approval to apply to be listed in Education Planner on a cost-recovery basis. Membership also carries responsibilities: new members must undertake to abide by the commonly accepted standards of the system and to meet the expectations of BCCAT as detailed in this policy, in the Contract/Letter of Assurance, and in the Principles and Guidelines for Transfer. Taken together, these three documents describe the norms, standards, and expectation for all members of the BC Transfer System, public or private, however and whenever admitted to membership. BCCAT holds all members, not just those who have signed the Letter of Assurance, to these standards.

Provisions of the Policy

1. Private Institution Degree Programs with Minister's Consent

The Degree Quality Assessment Board (DQAB) website records each time a new degree program at a private institution is approved. The website specifies whether the degree program has undergone the DQAB's quality assessment process with a recommendation for approval, and whether it has received Minister's Consent. Both conditions must be met before an appropriate degree program, and the courses within that program, can be articulated within the BC Transfer System (see Item 4: Institutions/Programs Appropriate for Articulation). A private institution with an appropriate program meeting these conditions can request that BCCAT list it as a new member of the BC Transfer System, approved to request formal articulation within the system. New members will be listed in the BC Transfer Guide and can also apply to be listed in Education Planner on a cost-recovery basis.

The provisions of this policy apply equally to new members' inclusion and participation in both services. However, policies related to inclusion in Education Planner may contain additional provisions unique to the contractual nature of participation in Education Planner.

[1] Previously titled: *Private Degree-Granting Institutions Policy*.

2. Membership Limited to Approved Programs

The approval to request articulation and the approval for inclusion in Education Planner extends only to programs meeting the conditions stipulated in Provision 1 above. In the case of a private institution included through the DQAB process, membership is not extended to non-degree programs at the same institution. Thus, in the case of some institutions, it is not the institution per se that is approved for inclusion but the authorised degree program(s) delivered at the institutional location(s) indicated in the Minister's Consent. However, it is understood that the institution bears responsibility for program(s) and for administrative support of articulation and transfer processes, therefore the term "new member" is used in this document, to denote the institutional entity responsible for operating within the BC Transfer System.

3. Special Conditions Associated with Consent

Any special conditions associated with Consent (such as a requirement to articulate courses successfully before final Consent is given, or requirements concerning learning resources, instructors, or physical plant) will be taken into account and may be reflected in the Letter of Assurance (see item 6 below).

4. Institutions/Programs Appropriate for Articulation

Programs at institutions with unique or specific missions, those offered only at the graduate level, or those with no parallels within the BC Transfer System, may not be appropriate for articulation within the BC Transfer System. In such cases, BCCAT reserves the right not to proceed with the institution's listing in the BC Transfer Guide. BCCAT also reserves the right to refuse or delay membership to an institution where, in the course of the admission process, concerns are raised such as those outlined in items 14 and 15 of this policy.

Courses and programs to be included in the BC Transfer Guide must be delivered (including registration, instruction, student assessment) entirely by the institution seeking access to the BC Transfer System, not by other institutions through partnership, affiliation or subcontracting agreements unless otherwise approved by Council. The institution should provide a list of all such agreements to BCCAT, whether with public or private institutions.

5. Formal Articulation and the BC Transfer Guide

"Formal articulation" refers to the process whereby one institution submits course or program outlines to another institution and requests transfer credit though BCCAT's Transfer Credit Evaluation System. Resulting transfer credit agreements are recorded in the BC Transfer Guide.
A variant of formal articulation involves the "Transfer Protocols," discussed in item 10, below.

6. Provision of Assurances to BCCAT

Before a new member can be listed in the BC Transfer Guide or in Education Planner, and before it can arrange formal articulation agreements, it must provide assurances to BCCAT that it will undertake to abide by the Principles and Guidelines for Transfer and the norms and standards of the BC Transfer System by signing the *Letter of Assurance*. The Letter constitutes a contract between the new member and BCCAT.

7. Designation as Sending or Receiving Institution in the BC Transfer Guide

Institutions are listed in the course-to-course section of the BC Transfer Guide as either *"sending institutions"* or *"receiving institutions"* depending on their primary function. Traditionally, with regard to transfer, colleges *send* their students to universities who *receive* students for degree completion.

a) Baccalaureate Degrees - Receiving Institutions

Where baccalaureate programs receive Minister's Consent and subsequent approval to request articulation in the BC Transfer System, it is assumed that the primary function of a degree-granting institution within the BC Transfer System will be, upon request, to assess the equivalency of courses offered by sending institutions and to grant (or deny) transfer credit for those courses. For this reason, new members with approved baccalaureate degree programs will be designated as receiving institutions.

b) Associate Degrees - Sending Institutions

Since the BC Associate Degree ladders into baccalaureate arts and science degrees and can be equated to the first two years of many baccalaureate degrees, new members with provisional Minister's Consent[2] to confer a BC Associate Degree are designated as sending institutions. These members are initially eligible to seek formal articulation with BC Research Universities only (SFU, UBC, UBCO, UNBC & UVIC), until such time as the terms of their provisional Consent are fulfilled.

Once successfully integrated into the BC Transfer System,[3] a new member can apply to BCCAT to add the sending institution or the receiving institution designation. The process for adding a receiving institution designation is described in the BCCAT document "Designation as a Receiving Institution in the BC Transfer Guide." The process for adding a sending institution designation is yet to be developed.

8. Reciprocity

Reciprocity of transfer credit may occur in practice but is not required. Therefore new members that assign transfer credit to courses from another institution can not assume, or represent, that their courses, in turn, will receive transfer credit at the other institution.

9. Block Transfer and Other Transfer Guides

New members are also approved to negotiate block transfer agreements with other institutions in the BC Transfer System. According to such an agreement, the new member can be listed as a sending or receiving institution in the Block Transfer section of the BC Transfer Guide. New members may also apply, to the articulation committee that manages it, to participate in any relevant program-specific transfer guides.

[2] Each course in the BC Associate Degree must be articulated with one or more of the BC research universities. Therefore, until the institution can articulate 20 or more courses with one or more of these universities, consent is not finalized.

[3] An institution is deemed to have been successfully integrated when it is articulating successfully, as appropriate to its programs and its status as a sending or receiving institution, when its faculty are participating in articulation committee meetings, when it is communicating as necessary with BCCAT through the Institutional Contact Person (ICP) and others, when students have started to transfer successfully, and when no significant concerns have been raised about its membership in the system.

10. Transfer Protocols

If, in the opinion of a receiving institution, a sound business case does not exist for course-to-course articulation (that is, it is unlikely that enough students will transfer to justify the time and expense of articulation), a receiving institution may opt to provide assurances to a new or existing member that its courses/programs will be recognised for transfer credit on a case-by-case basis.

If the new member wishes to formalise such an understanding, in order to provide appropriate assurance to its students, it can request that institutions sign a "transfer protocol." BCCAT can supply suggested protocol templates. A transfer protocol states that transfer between the two institutions will occur, but will be managed on a case-by-case, student-request basis, such as currently happens between universities in BC. The signing of such a protocol does not prevent institutions from formally articulating specific courses where warranted. Transfer Protocols may be recorded, as requested and as appropriate, in the BC Transfer Guide.

11. Declining to Articulate Requires a Sound Rationale

While any decision to articulate rests with the receiving institution, any institution that declines to articulate with a new member (either through formal articulation or through a Transfer Protocol) should provide a sound rationale for its decision, and indicate what issues must be addressed before the institution can re-apply. If the new member perceives the decisions to be unreasonable or unfair, and is unable to resolve the issues, it can request that BCCAT mediate the dispute.[4]

12. BCCAT Fees

BCCAT does not currently charge any institution, public or private, directly for the costs involved in being listed in the BC Transfer Guide, for mediation services, or for assistance with other aspects of participation in articulation processes. BCCAT charges all private institutions for the costs involved in including their programs in Education Planner.

13. Institutional Articulation Fees

In addition to possible charges from BCCAT, each institution will make its own determination as to whether and how much to charge private institutions for the costs associated with negotiating and maintaining articulation agreements.

14. Yearly Review and Monitoring

The DQAB conducts an Annual Review of each institution with Minister's consent, and conducts a Renewal of Consent Review every five years. For those new members admitted though the DQAB process, BCCAT will provide input for those reviews by reporting annually to the DQAB on each new member's articulation activities, on its adherence to the Letter of Assurance and to the Principles and Guidelines for Transfer, and on any other matters relevant to its membership in the BC Transfer System. It is understood, however, that new institutions will take some time, and possibly three to five years after Consent is granted, to be fully functioning members of the BC Transfer System. BCCAT's review will take institutional maturity into account and will normally focus on facilitating the induction and integration of the new member into the BC Transfer System.

[4] Terms or criteria established by professional accrediting bodies can impact on an institution's ability to grant transfer credit and in such cases neither the institution nor BCCAT may be in a position to affect the decision. Mediation entails facilitating further discussions between the institutions with the goal of achieving a mutually acceptable outcome. Although BCCAT may suggest possible solutions, it has no authority to impose a binding resolution to the issues in dispute.

If there is evidence that any new member:

- is not adhering to the *Principles and Guidelines for Transfer*
- is not fulfilling its obligations as detailed in the *Letter of Assurance* or the Education Planner Contract;
- has demonstrably failed to meet the academic standards expected in the program/discipline;
- has plagiarised the work of other institutions;
- has made false or misleading claims about the transferability of its courses or programs or about the nature of its participation in the BC Transfer Guide or in Education Planner; or
- has been the subject of legitimate concerns or complaints raised, or investigations undertaken, by other institutions, professional accrediting bodies, the Private Career Training Institutions Agency (PCTIA), government, police or border services, or any other relevant body inside or outside BC, that have not, in the opinion of the Council, been adequately addressed;

BCCAT will report the concerns about DQAB-approved institutions to the DQAB with the request that the DQAB take this report into consideration when conducting an annual review and /or a five year Renewal of Consent Review, or when taking other steps or actions within the scope of its authority.

If the institution is not DQAB-approved or whenever concerns arise with any institution that require immediate action, BCCAT will communicate directly with the institution with the purpose of identifying clearly the nature of the concern and clarifying expectations, and will work with the institution to ensure the situation is rectified.

15. Discretion of BCCAT to Suspend Membership

If the concern is of sufficient magnitude BCCAT reserves the right to deliver to the new member a notice of suspension by the Council from the BC Transfer Guide and/or Education Planner, with a copy to the DQAB and any other relevant agency (e.g. PCTIA). If the new member does not satisfactorily address the concerns or deficiencies within 60 days of dispatch of the notice, membership in the BC Transfer System may be suspended5. In cases where there is evidence of a clear and egregious violation of the Letter of Assurance membership may be suspended immediately, subject to confirmation by motion of Council. Every effort will be made to safeguard the educational interests of students enrolled in institutions whose membership is suspended.[5]

16. Changes to Minister's Consent

Suspension, revocation or amendment of Minister's Consent will result in the *de facto* suspension, revocation or amendment of the institution's membership in the BC Transfer System. Any similar change to the authorization of an out-of-province institution will have similar consequences.

[5] Suspension may involve removal of the institution from the BC Transfer Guide or Education Planner until stipulated criteria have been met, or sanctions of other kinds at the discretion of the Council.

17. Duty to inform

a) BCCAT will inform the DQAB, the PCTIA and the BC ministry responsible for advanced education (or responsible ministry in any other Canadian province) about any disciplinary action involving the new member.

b) The new member must inform BCCAT immediately of any disciplinary action or censure it incurs, or any investigation into its operations undertaken by government, DQAB, PCTIA, any professional accrediting organization, or any other relevant body inside or outside BC.

18. Requesting Reconsideration

The new member may request reconsideration of decisions or actions of BCCAT in writing to the Council. The Council may appoint a panel to review the case and recommend outcomes.

19. Revisions to this Policy

BCCAT may review, from time to time, the provisions of this policy, and make such changes as deemed necessary by the findings of such review.

APPENDIX 5:
CONTRACT LETTER OF ASSURANCE

CONTRACT LETTER OF ASSURANCE

Between _____

and the

BC Council on Admissions and Transfer

Institution Address: _____

Degree Program(s) to be listed in the BC Transfer Guide: _____

As new members of the BC Transfer System, we undertake to adhere to the norms of the system and to follow, to the best of our ability, best institutional practice in participating in articulation and transfer and in providing information about programs. We will:

1. Familiarise ourselves with BCCAT's *New Members Policy,* and adhere to the requirements of this policy.

2. Comply with the BC Principles and Guidelines for Transfer.

3. Follow best practice, as described in BCCAT documents such as the *Best Practice Guide for Receiving Institutions*, the *How to Articulate Handbook*, the *Articulation Committee Companion*, and the *Articulation Framework* with regard to the articulation of courses and programs.

4. Implement, in a timely fashion, the internal administrative processes necessary to have all formally articulated courses listed and updated as required in the BC Transfer Guide and in Education Planner (if participating).

5. Name an Institutional Contact Person (ICP) for BCCAT. This person will initially be _____ (email address:) and he/she will fulfill the role of ICP as laid out in the Terms of Reference for the ICP Committee.

6. Name an Institutional Contact Person (ICP) for Education Planner, if participating. This person will initially be _____ (email address:)

7. Use the BCCAT web-based Transfer Credit Evaluation System for all formal articulation requests, and provide BCCAT with the name of a Transfer Credit Contact (TCC) Person. This person will initially be _____ (email address:). This person can be the same as the ICP.

8. Use a sufficiently detailed course outline form [such as the BCCAT Provincial Transfer Friendly Course Outline: http://www.bccat.ca/articulation/resources/outline for all courses for which articulation is being requested.

9. Provide, as requested, all other curricular and academic information that an articulating institution may deem necessary for the assessment of course or program equivalence.

10. Be informed by existing course outlines as appropriate to the discipline, but will ensure that our course outlines do not contravene intellectual property laws; nor will we use the curricular or instructional materials of others without their written consent.

11. Use the Transfer Credit Evaluation System to articulate only courses and programs clearly related to the degree program(s) with Minister's Consent.

12. Transmit and receive student transcripts and award transfer credit in a timely manner. [For transcript standards, BCCAT recommends the National Transcript Guide (http://www.arucc.com/documents/transe.pdf) endorsed by the Association of Registrars of the Universities and Colleges Canada (ARUCC).] Where feasible, transcripts should be transmitted electronically.

13. Send a representative to relevant articulation committees. This representative will be a full voting member of the committee. All details about articulation committees and the role of representatives can be found in the *Articulation Committee Companion*. (Please contact articulation@bccat.ca for more information.)

14. Respect provincial norms regarding instructor qualifications for courses and programs to be articulated. BCCAT's position statement on *Instructor Qualifications for Transferable Courses* can be found at: http://www.bccat.ca/pubs/qualifications.pdf.

15. Agree to assess and accept for transfer credit, on a case-by-case basis, *equivalent* courses completed at other institutions in the BC Transfer System where course-to-course articulation has not been established and recorded in the BC Transfer Guide for structural (e.g. articulation between two receiving institutions not normally recorded) or business (not enough students to justify articulation) reasons. This can be done through a *Transfer Protocol*.

16. Provide clear and accurate information to current and prospective students about transfer agreements and will not, in any print, web-based, audio, video or other publications, or when recruiting or advising students, make false, overstated or misleading claims about the nature of our participation in the BC Transfer System and/or the benefits accruing to students.

17. Engage in articulation and transfer processes as sincere members of the BC Transfer System, with the aim of facilitating appropriate student mobility and transfer, and not use this membership for purely promotional or marketing purposes.

18. Alert BCCAT immediately to any situations that may impact on our ability to participate fully in the BC Transfer System.

19. Inform BCCAT of any investigation of our operations undertaken by government, DQAB, PCTIA, any professional accrediting organization, or any other relevant body inside or outside BC, and inform BCCAT of the outcomes of any such investigation.

Signed on behalf of the Institution by: _____

Please print name: _____

Title: _____

Date: _____

Copies:
1: Institutional Registrar
2: Transfer & Technology Manager, BCCAT

APPENDIX 6: INSTRUCTOR QUALIFICATIONS FOR TRANSFERABLE COURSES

Position Statement

The following represents BCCAT's position on instructor qualifications within the BC Transfer System:

1. BC Transfer System Instructor Qualification Standards

a) Based on long-standing precedents in the BC Transfer System, BCCAT expects that instructors who teach academic, degree-level transfer courses will usually possess, at a minimum, a master's degree or equivalent in the discipline or in a closely related area.

b) Instructors teaching in other transferable programs (e.g. diploma programs) will usually possess, at a minimum, credentials consistent with the normative requirements for that program in the BC Transfer System.

c) It is recognized that there may be programs in which other qualifications are equally, or more, appropriate. (Examples of alternately qualified instructors: First Nations elders, practising artists, acknowledged or renowned experts or practitioners.)

d) When, for legitimate reasons, it is not possible to engage faculty who meet the standards described above, institutions should provide appropriate mentoring and supervision.

2. Establishing and Monitoring Expectations

a) BCCAT expects institutions participating in the BC Transfer System to develop and/or make explicit and accessible their policies on instructor qualifications for
i. hiring of instructors in programs for which transfer credit may be negotiated, and for
ii. awarding transfer credit for courses taught at other institutions.

b It is reasonable for any receiving institution upon occasion to seek assurance as to the hiring policies or practices at a sending institution, or to request specific information about the qualifications of an instructor for an articulated course.

c) In the event that a concern arises that cannot be resolved between the institutions, BCCAT can provide mediation services, if requested. Mediation entails facilitating further discussions between the institutions with the goal of achieving a mutually acceptable outcome. Although BCCAT may suggest possible solutions, it has no authority to impose a binding resolution to the issues in dispute.

Background

Within the BC Transfer System, the matter of instructor qualifications has raised, and continues to raise, controversy where receiving institutions suspect that courses at a sending institution are not being taught by a suitably qualified instructor. Providing information on instructor qualifications is specified in the Principles and Guidelines for Transfer. Guideline number 1 states:

> *The institutions seeking transfer credit should be prepared to provide the following information: course name, course number, length of instructional period, hours per week (lecture, lab, seminar) objective of course, and - although subject to change without notice - texts and required reading, initial proposals for method of instructing and evaluation, and the qualifications of instructors.*

In the past, when a course was being initially articulated, it was usual to provide some brief details about the qualifications of the instructor. A brief statement sufficed, consisting of the relevant degree(s) held, the discipline, where and when conferred. e.g. John Doe, MA in History, SFU, conferred 1992. Jane Smith, MBA with emphasis on Accounting, U of London, 1989.

In the spring of 2004 BCCAT conducted an extensive consultation with members of the BC Transfer System in the course of developing a Provincial Transfer-Friendly Course Outline Form. Overwhelmingly, the input received supported removing individual instructor qualifications from the course outline. All institutions that responded asserted that it is the responsibility of individual institutions to ensure that transfer courses are taught at the right level and to hire instructors with the appropriate qualifications. Therefore BCCAT now recommends that rather than identifying the specific qualifications of intended instructor(s) on a course outline submitted for articulation, *the sending institution should specify its policy with respect to instructor qualifications for the course in question.*

Special Circumstances

In some specialised disciplines (e.g. indigenous languages) or degree programs (e.g. emerging technologies, fine and performing arts) it is often appropriate and preferable to hire instructors with qualifications other than postgraduate degrees. All institutions within the BC Transfer System recognize that there are legitimate circumstances under which it would be inappropriate or even impossible to insist on a master's degree as the required or only possible qualification.

In addition, there are many non-degree program areas in which transfer is common (e.g. between applied business technology programs) but in which instructors are not expected to possess postgraduate degrees. In these cases, receiving institutions should ensure that they make explicit any expectation they have about the qualifications of instructors at their own institutions as well as at sending institutions.

Some institutions, especially smaller ones, occasionally find themselves in the position of having to hire a sessional instructor with less than optimal qualifications. BCCAT research into this issue indicates that no institution does this by choice, or consistently, and that institutions are careful about their hiring policies for academic programs and have instituted appropriate supervisory safeguards. For example, one college's policy states that an instructor can be hired on a sessional basis (but not to a regular position) to teach a UT course without a master's degree, provided he/she teaches "under the auspices" of an articulating instructor. The reference to the "articulating instructor" is to a regular faculty member who has the appropriate qualifications, and "under the auspices" means that he/she would check the course outline, approve the final exam, and mentor or supervise the sessional instructor in appropriate ways.

When Concerns Arise

It is BCCAT's position that receiving institutions can place reliance and trust in the integrity of the long established sending institutions, and in the well developed articulation processes in BC, including the articulation committees. Thus, they can choose with confidence not to over-emphasize instructor qualifications, by avoiding practices such as requesting a Curriculum Vitae or routinely questioning instructor qualifications once the course has been articulated for transfer credit. Best practice is to concentrate instead on assessing curriculum-related matters stated in the course outline such as equivalence of the academic standards, topics covered, evaluation methods, expectations of students, learning outcomes, etc.

Nevertheless, where an institution develops a concern regarding the practice at a specific sending institution BCCAT advises that it take the matter up with that institution directly. It is reasonable for any receiving institution upon occasion to seek assurance as to the hiring policies or practices at a sending institution, or to request specific information about the qualifications of an instructor or instructors for an articulated course. In the event that the concern cannot be resolved between the institutions, BCCAT is also prepared to offer its mediation services, if requested.

Conclusion

As the BC Transfer System expands and changes and welcomes new members, institutions which have been in the past predominantly sending will increasingly find themselves in the role of receiving institution. In such situations institutions that may have objected to supplying information on instructor credentials to other receiving institutions may in turn find that seeking assurance in regards to qualifications of the instructional staff, while only one of multiple determinants in a transfer credit decision, is often an appropriate and sensible thing to do.

BCCAT Your guide through post-secondary education.

709 – 555 Seymour Street, Vancouver BC Canada V6B 3H6
bccat.ca | admin@bccat.ca | t 604 412 7700 | f 604 683 0576